Application Registration

This process will be used for entering:

- New applications,
- Reapplications with a different PI (Primary Information person), or
- Reapplications for cases that were denied or closed more than four benefit months ago.
  - NOTE: See separate "Quick Registration" procedure for cases that (a) were closed for four months or less and (b) have the same PI as before.

TEAMS will not allow a new application to be registered without first searching ("inquiring") to see if all applicants are already on the database. You must enter the person's SSN (if available) and their name, birthdate, and sex before performing the search.

	Step	**Action**
Inquire on Person (INOP):	**1.**	From the SYSE menu, NEXT to CLIR (Client Inquiry and Registration).
	2.	Type any character in the space next to INOP (Inquire on Person). Then tab down to the SSN field, and type in the participant's SSN as noted on the application. (If the SSN is not available, type 'N' in the "Is SSN Available" field.) *** Do NOT press Enter yet. ***
	3.	Tab to the Identifying Client Information section and type in the following: • the person's full surname if available, or a minimum of the first 4 characters, along with Y in the IF PARTIAL, ENTER Y field; • their full (legal) first name if available, or an initial; • their middle initial, if available; • their birthdate; and • their sex (M or F). Press Enter. The system will search for the SSN first. ♦ If the message "No Client Found Using SSN" appears at the bottom of the screen, continue with Step 4. ♦ If a client IS found, skip ahead to Page 3, "If the System Finds a Match."
	4.	Once again, type any character next to the INOP menu selection. (The system has searched first for the SSN, and now it will search by surname.) Press Enter. ♦ If the message "No Client Found Using Surname" appears, continue with Step 5. ♦ If a client IS found, skip ahead to Page 3, "If the System Finds a Match."

If the person is not found on the database after a thorough search, he or she will be stored as a new client using the next step. Please perform a thorough search to avoid saving duplicate clients!

Save New Client for Registration (SANC):	**5.**	Tab to the menu selection SANC, and type any character in the space. Press Enter. This will save the client with the name, birthdate, SSN, etc. that you entered during the inquiry process. ♦ Note: No changes are allowed to the person's SSN, name, birthdate, etc. during this step. If personal information is incorrect, you must conduct a new search on that data. (Press F12 to clear the old data first.) ♦ If TEAMS displays the "POSSIBLE DUPLICATE CLIENT" message, please be certain you are not creating a duplicate prior to saving.
Repeat inquiry for each person on application:	**6.**	Repeat Steps 2 – 5 for the next person listed on the application. Continue until you have searched for and saved *every* person listed. ♦ Note: The menu option **CLRV** accesses a list of persons saved thus far. Don't worry if CLRV lists people in a different order than they appear on the application; you will determine the actual order later on APRE.
Register the case (RAEC or RANC):	**7.**	Choosing the correct registration option depends on the status of the Primary Information person (PI). This is the person who completed the application and who will serve as the main contact for the case: ♦ If your PI was found on the system AND he/she also served as the PI before, then the old case number (obtained from the CLPR screen) must be "reused." Select **RAEC** (Register Application for Existing Case), and enter case number in Existing Case Number field. ♦ If the PI was already on the database but was NOT the PI before, select **RANC** (Register Application for New Case). A new case number must be created if the PI has changed. ♦ If the PI was newly added to the system, select **RANC**.
	8.	Tab to ONE of the fields at the bottom of the screen, as follows: • If you are registering an existing case (RAEC), enter the 'old' Case Number where indicated. • If you are registering a new case (RANC), enter your Caseload Number where indicated. Press Enter. This accesses the APRE (Application Registration) screen.
Register programs on APRE:	**9.**	Complete the following application details on the upper portion of **APRE**: • Your caseload number, if RAEC was selected and another worker's caseload appears at the top of the screen; • The program(s) applied for; • The date the application was received; and • The program start date. Then tab to the lower section and enter the following: • A code for each person's relationship to the PI, and • The Position on Application (POA) number for each person. The POA number is the order in which they appear on the application. (The PI <u>must</u> be assigned POA number 01.) Press Enter. This accesses the **ADDR** screen and begins the default screenflow for the program(s) registered. ♦ (Note: For new cases, the case number is generated at ADDR. If you exit the system earlier, you must start over with the INOP process.)

****** End of Application Registration process. Read on for 'CLIS' and 'CLPR' instructions. ******

If the system finds a match during the inquiry process (INOP):

When the SSN or the surname is recognized by the system, you will see *either:*

- the **CLIS** screen (if <u>more than one possible match</u> was found), or
- the **CLPR** screen (if <u>only one possible match</u> was found).

Follow the appropriate actions below, depending on the circumstance shown in the left column.

Circumstance	**Action**
If **CLIS** is displayed:	Review the names on CLIS ("Client Inquiry Short List"). TEAMS will display all clients having the same last name and first initial as that entered on CLIR. Any names that exactly match the full name entered on CLIR will be highlighted. Do one of the following: • If the person you're searching for **is listed** on CLIS (or if you want more information to be sure), type his/her **sequence number** in the field at the bottom of the screen. (The sequence number is on the left edge of CLIS.) Press Enter. This accesses the CLPR (Client Profile) screen. – See CLPR instructions below. – You can return to CLIS by entering Y in the "Return to Client Short List?" field. • If the person you're searching for **is <u>not</u> listed** on CLIS, press F2 to return to the CLIR menu. You must repeat steps 2 – 4 on Page 1, if the person could be on TEAMS under a different name or spelling. (On CLIR, press the F12 key to erase the data entered before inquiring again. Expand your search by entering only the first 4 characters of the SURNAME (also enter Y in the PARTIAL field), and the person's first initial instead of the person's entire first name.)
If **CLPR** is displayed:	Carefully review the client's name, birthdate, SSN, etc. on CLPR to verify whether this is the same person listed on the application. • If this **is** the correct person, type a 'Y' in the "Save This Client For Registration" field. Press Enter. (This selects the client for registration, and returns you to the CLIR menu.) • If this **is not** the person you were looking for, you can press F2 to return to the CLIR menu. Or, if you had accessed CLPR via the CLIS screen, you can type Y in the "Return to Client Short List?" field to return to CLIS.

Upon returning to the **CLIR** menu:	♦ If a <u>thorough</u> inquiry indicates the person does not exist in TEAMS, return to Step 5 (page 2) to store the person to the database.